

# Service Coordination in Early Intervention

Division for Early Childhood and  
IDEA Infant & Toddler Coordinators Association  
Joint Position Statement



Division for  
Early  
Childhood

of the Council for Exceptional Children



**IDEA**  
INFANT & TODDLER  
COORDINATORS ASSOCIATION



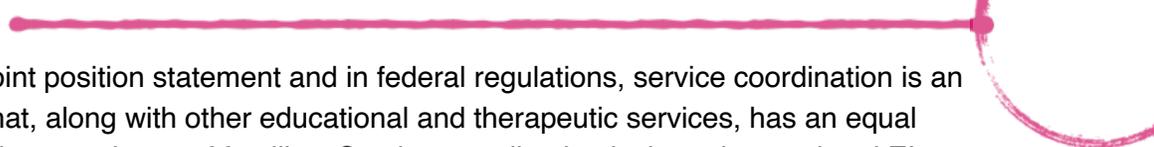
# Service Coordination in Early Intervention

Division for Early Childhood (DEC) and IDEA Infant & Toddler Coordinators Association (ITCA)  
December 2020

The Division for Early Childhood (DEC) of the Council for Exceptional Children (CEC) and the IDEA Infant & Toddler Coordinators Association (ITCA) collaborated on this joint position statement to acknowledge the importance of early intervention (EI) service coordination and recognize the expertise and needs of the professionals who provide this service. Because of the complex nature of service coordination and the essential role of service coordinators in the EI process (Bruder et al., 2005; Childress, Nichols, & Schnurr, 2019; West, Duggan, Gruss, & Minkovitz, 2018), it is the position of the DEC and ITCA that service coordinators must have the knowledge, skills, administrative support, professional development, and resources they need to provide the highest quality services to children and families. Service coordinators in the United States and in international programs need administrative support and supervision from leaders who understand their role and appreciate the distinct responsibilities of the position. While decisions about hiring, compensation, and the numbers of families served per service coordinator are often made at the local program level, leaders must take into consideration the complexity of the work and the specialized knowledge and skill set necessary to support the unique population of families of infants and toddlers with delays or disabilities. With those considerations in mind, it is imperative that compensation and the workload required of service coordinators reflect the significant demands faced by these professionals.

The DEC and ITCA also endorse the use of the guidance document, *Knowledge and Skills for Service Coordinators* (KSSC; see Appendix A; Workgroup on Recommended KSSC, 2020) by state and local programs to ensure consistency in the hiring and training of service coordinators in early intervention. To address learning needs of both new and experienced service coordinators, state and local programs are urged to prioritize high-quality, evidence-informed professional development so service coordinators can gain the knowledge and skills needed to effectively collaborate with families; manage the workload; achieve compliance with federal, state, and local requirements; and coordinate team activities. Finally, the DEC and ITCA encourage state and local programs to educate other EI team members, community partners, funders, and legislators about the important role service coordination so that service coordinators are valued and supported as indispensable team leaders.

## Call to Action



As described in this joint position statement and in federal regulations, service coordination is an essential EI service that, along with other educational and therapeutic services, has an equal and impactful role in the experience of families. Service coordination is the only mandated EI service under Part C of the Individuals With Disabilities Education Improvement Act (2004);



therefore, it should have equal importance, administrative support, and opportunities for professional development as other services. To build the knowledge, skills, and expertise needed to effectively assume the complex roles and responsibilities of EI service coordinators, the DEC and ITCA strongly recommend the following:

1. States and local programs should review and align current competencies to the indicators in the *KSSC* document. Or, where competencies are not already in place, the *KSSC* should be adopted to guide hiring decisions and inform inservice professional development of current and future service coordinators. Adopting this guidance would promote consistency across states and international programs, which would elevate the quality of services provided to young children and families receiving EI.
2. Leaders who hire, supervise, and mentor service coordinators must have a thorough understanding of the expertise and needs of these professionals. This understanding is essential to ensure that compensation aligns with the level of responsibility expected of service coordinators. Service coordinators also should have appropriate administrative support, reflective supervision, and resources to successfully manage the workload, navigate changes in policies and procedures, and, most importantly, partner with families.
3. States and programs must consider multiple factors when determining workload size to ensure that service coordinators can manage the roles and responsibilities outlined in this joint position statement. The factors to consider include (1) the number of families served per service coordinator, (2) the varying levels of need experienced by families, (3) the model of service coordination implemented in the state/program, (4) the need for administrative support and supervision, and (5) the level of responsibility, educational background, and any specific expertise required of service coordinators in a given state or program. Although no single number can ensure an ideal workload for all who provide service coordination, professionals in this role have reported significant challenges with managing their workloads, especially when local resources and support are limited, compensation is low, and the number of families served is high (Childress et al., 2019). It is, therefore, imperative that administrators acknowledge the strain that high workloads place on service coordinators and use the variables provided in this position statement to determine and monitor manageable levels that lead to better retention of these professionals and higher quality services.
4. Additional research is needed to identify recommended practices specific to service coordination, which could be guided by the *KSSC document*. Research also needs to address how these practices would be implemented with families and how service coordinators would be trained to use these practices during preservice and inservice training. Findings could then be used by policy makers and other leaders to build in the necessary resources EI systems need to ensure that service coordinators can implement the diverse roles and responsibilities described in this joint position statement.



To achieve the goal of high-quality service coordination for all children and families receiving EI, states must prioritize professional development for new and experienced professionals in this role. As the only federally mandated EI service under Part C of IDEA, states (and their international counterparts) have a responsibility to ensure that families are met by professionals who have the knowledge, skills, beliefs, and abilities to support families using recommended practices.

## Introduction



This joint statement provides an overview of service coordination under Part C of the Individuals With Disabilities Education Improvement Act of 2004 (IDEA) and highlights the knowledge and skills that all EI service coordinators should possess, regardless of program or location. Information is provided about specific beliefs, values, and, importantly, the expertise that a well-qualified service coordinator brings to the EI team. The unique roles and responsibilities of service coordinators are described in Appendix B so that other EI team members, families, and community partners understand and acknowledge the complexity of their essential work.

## Overview



According to federal regulations implementing IDEA (2004), EI service coordination is defined as services “to assist and enable an infant or toddler with a disability and the child’s family to receive the services and rights, including procedural safeguards” (34 C.F.R. § 303.34). Specifically, Part C of the IDEA outlines federal requirements for EI programs that serve eligible infants and toddlers, birth to 36 months, who have developmental delays and/or disabilities and their families. In the United States, all families who participate in EI receive service coordination. In other countries, similar coordination of services may be available in some early childhood intervention systems. Other EI services available to eligible children and families include special instruction, physical therapy, speech language therapy, etc., and are driven by the priorities for the child’s development and the family’s desired outcomes for the child, which are captured on the Individualized Family Service Plan (IFSP). These services are provided in the child’s and family’s natural environment—the settings, activities, and routines that are meaningful to children and families and places where children without disabilities spend time. Service coordination is unique compared with other EI services because it is the only federally mandated service to be provided to all eligible children at no charge to families.

Service coordination is also distinct because of the roles and responsibilities of the service coordinator and the individualized support they provide to the family. The service coordinator brings expertise to the EI team on navigating the EI system, using family-centered practices, linking families to community resources, fostering strong family-professional partnerships, and facilitating and documenting the EI process. As outlined in regulations implementing IDEA (2004), a service coordinator is an important team member because he or she is the single point

of contact for all team members, including the family, to ensure that EI services are individualized and appropriate to child and family strengths, interests, and needs.

## Service Coordinator Knowledge, Skills, and Activities

Like all early childhood professionals, service coordinators engage in service planning, coordination, and collaboration on behalf of children and families, as indicated in the *Zero to Three Competencies for Prenatal to Age 5 Professionals* (Zero to Three, n.d.). The DEC Recommended Practices, written and published by the DEC (2014), also emphasize the importance of family and professional collaboration and teaming when practitioners such as service coordinators engage with families. The *Knowledge and Skills for Service Coordinators* (Workgroup on Recommended KSSC, 2020), which was developed by the National Service Coordination Leadership Institute Group and is included in this joint position statement as Appendix A, lists the specific knowledge and skills necessary for the provision of high-quality service coordination. The document emphasizes that service coordinators must have knowledge and skills in the areas of infant and toddler development, family-centered practices, leadership and teaming, coordination of services, transition, and professionalism.

Additionally, the federal regulations implementing Part C of IDEA (2004) outline 10 specific service coordination activities:

1. Assisting parents of infants and toddlers with disabilities in obtaining access to needed early intervention services and other services identified in the IFSP, including making referrals to providers for needed services and scheduling appointments for infants and toddlers with disabilities and their families;
2. Coordinating the provision of early intervention services and other services (such as educational, social, and medical services that are not provided for diagnostic or evaluative purposes) that the child needs or is being provided;
3. Coordinating evaluations and assessments;
4. Facilitating and participating in the development, review, and evaluation of IFSPs;
5. Conducting referral and other activities to assist families in identifying available [EI] providers;
6. Coordinating, facilitating, and monitoring the delivery of services required under this part to ensure that the services are provided in a timely manner;
7. Conducting follow-up activities to determine that appropriate part C services are being provided;
8. Informing families of their rights and procedural safeguards, as set forth in subpart E of this part and related resources;
9. Coordinating the funding sources for services required under this part; and
10. Facilitating the development of a transition plan to preschool, school, or, if appropriate, to other services. (34 C.F.R. § 303.34)



The implementation of each activity is individualized by the service coordinator to help families actively participate in the EI process and meet child and family needs. How these activities are implemented often looks different because of factors such as who provides service coordination; what model of service coordination is used (i.e., dedicated or blended models); how many families are served; what professional backgrounds, experience, training, and certifications are required; and what funding structures are used are determined at the state and program levels (Bruder et al., 2005; Childress et al., 2019; Gomm, 2006; Hallam, Rous, & Grove, 2005). Despite these differences, all service coordinators must implement these activities using fundamental capacity-building practices that support families in meeting their needs (Dunst, Bruder, & Espe-Sherwindt, 2014). Even though federal regulations outline what service coordination includes, there is a need for more consistent implementation of the roles and responsibilities of service coordinators across the EI field (Bruder, 2010). One way to provide consistency is the adoption of nationally developed knowledge and skills for service coordinators such as those included in the *KSSC*, which EI programs are encouraged to integrate into their service coordinator hiring and training activities.

## Service Coordinator Beliefs, Expertise, Roles, and Responsibilities



In alignment with the *KSSC*, the DEC and the ITCA recognize the need for a common understanding across the EI field about what high-quality service coordination looks like and what knowledge and skills are recommended for professionals who provide this service. Therefore, to complement the *KSSC* and the descriptions outlined in this position statement, it is necessary that the field recognize and acknowledge the beliefs, expertise, roles, and responsibilities of professionals who provide service coordination. This position statement expands on the service coordination activities outlined in Part C of the IDEA (2004) to provide state and local programs guidance on how to prepare, hire, train, monitor, and support service coordinators.

### Beliefs



The beliefs of service coordinators guide the service they provide. First and foremost, an effective service coordinator believes in the value of the family. Each family brings their own uniqueness to the EI system as well as their own values and beliefs, parenting preferences, culture, daily routines, interests, and activities. Additionally, families bring their own resources, supports, and preferences, which will influence how they engage with the EI system. Respecting this uniqueness, promoting equity, practicing cultural humility, and being willing to meet families “where they are” are essential when planning for the IFSP and individualizing intervention.

Service coordinators who provide family-centered services also believe in the strength of a team approach to support families that is grounded in respectful, equal partnerships and connects to the mission of EI (Workgroup on Principles and Practices in Natural Environments, 2008). To



achieve the mission, which emphasizes the support provided to family members and caregivers so they can enhance child development, service coordinators must understand that the parent is the agent of change in the child's development and the service providers are coaches and consultants to the parents (Rush & Shelden, 2020; Woods, 2019). The assessment, IFSP, and delivery of services must address and support the interactions that happen between the parent and child during visits as well as between visits, when most learning and interactions occur (McWilliam, 2010). Holding these beliefs allows service coordinators to understand what high-quality EI should look like so they can communicate this to all team members, especially families.

Finally, service coordinators must believe in their own value. The service coordinator's contribution to the team is more than a record keeper who manages documentation and the paper trail. Service coordination includes leading the team and bringing team members, approaches, and resources together to support each family. Service coordinators also individualize the services they provide so that families' unique strengths are built upon and needs are addressed. Responsive, family-centered service coordination is a cornerstone of a successful EI experience for families.

## Expertise



Because service coordinators generally come from a variety of educational and professional backgrounds (Bruder et al., 2005), the specific expertise that they bring to the EI team may be unclear to other team members who are not familiar with the role. First, a service coordinator must have expertise in the EI process, including understanding requirements, processes, and recommended practices and helping families navigate the local EI system from referral through exit. The service coordinator must understand local, state, and federal policies and procedures and how they apply to effective service delivery. Because most families enter EI without previous knowledge or experience in the EI system, the service coordinator must provide guidance to prepare families for each step in the process. Service coordinators do this by providing information and ensuring caregivers are informed decision-makers and active participants throughout the process.

It is important that service coordinators have expertise in team leadership, facilitation, and collaboration. The service coordinator brings together a multidisciplinary team of professionals to provide services that capture a family's concerns, honor the family's priorities, and champion the caregivers' confidence in promoting the child's development. Service coordinators facilitate interactions and maintain communication among team members, acting as a central "hub" for collaboration. The service coordinator organizes participation of all members, including the family, on evaluation and assessment teams, IFSP development teams, and service delivery teams. These teams vary in composition, depending on a child's IFSP and local or state program structure, so the service coordinator must have a good grasp of service options available in the program and community and maintain positive relationships with team

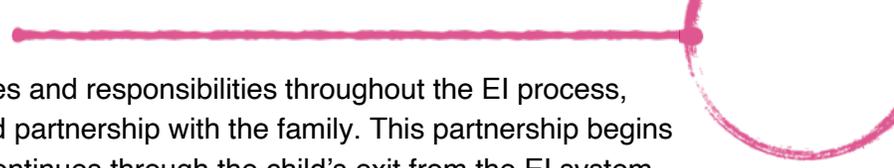


members. Advocating for families and helping families learn to advocate for themselves are part of the service coordinator's leadership role. In this role, the service coordinator can be thought of as the "glue" or "linchpin" that holds the team together (Bruder & Dunst, 2006; Harbin et al., 2004).

Another area of expertise that is unique to service coordinators is their knowledge of and ability to build relationships with community resources. Service coordinators build relationships with referral sources, medical professionals, social service agencies, preschools, childcare partners, family support programs, and others in their community to gather and maintain knowledge of what is available. New service coordinators build this expertise over time, while seasoned service coordinators must constantly update and expand their knowledge as resources appear, disappear, and change. When a caregiver needs help problem-solving, identifying, or accessing a community resource to meet a need or address an IFSP outcome, the service coordinator is the primary source of information on the EI team. Information from these community partners can then be shared with families to help them access needed resources and build their capacities to find them in the future, especially after the child and family are no longer receiving EI.

Finally, service coordinators bring expertise to the EI team in how to build strong family-professional partnerships. Through regular communication with caregivers, special instructors, therapists, physicians, etc., the service coordinator helps all team members remain fully informed about the child's progress, changing family priorities, needs, questions, and changes to outcomes, services, or other information on the IFSP. Facilitating reciprocal, family-centered communication builds trust, respect, and partnership, all of which are essential when coordinating and providing EI services. When needed, service coordinators seek out assistance from language interpreters, translators, and cultural liaisons to ensure families' informed participation in the partnership. This sense of shared partnership is important when meeting families where they are, respecting what they want for their family, and empowering them to advocate for themselves. It is also essential when service coordinators coach families on how to navigate the EI system; engage with physicians, service providers, and other community partners outside of the EI system; and understand their rights in EI and other programs.

## Roles and Responsibilities



Service coordinators have a variety of roles and responsibilities throughout the EI process, many of which are grounded in the shared partnership with the family. This partnership begins with the first contact with the family and continues through the child's exit from the EI system. Service coordinators often receive referrals and conduct intakes or initial visits with families entering the EI system. During these initial contacts, service coordinators orient families to the EI system, introduce families to their rights and procedural safeguards, and gather information about the child's development and medical history as well as the family's priorities, concerns, resources, and daily activities. Service coordinators plan for evaluation and assessment by



bringing together multidisciplinary teams and ensuring that family members are equal team members. If a child is found eligible for EI, the service coordinator facilitates IFSP development so the plan includes an evaluation and assessment summary, child and family outcomes based on what is important to the family, and services designed to build family capacity to encourage the child's development during daily activities and routines.

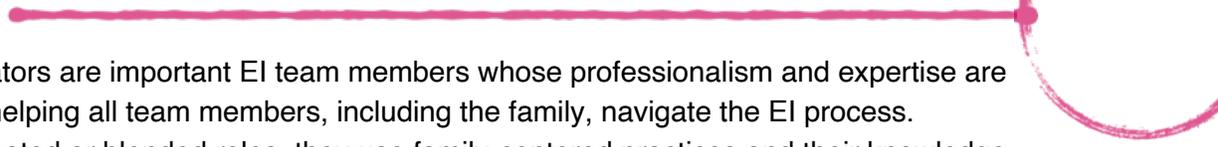
Depending on the model of service coordination employed by an EI program, service coordinators may engage in service coordination as their only role with a family (dedicated model) or may have an additional role, such as when a service coordinator is also another service provider (e.g., speech-language pathologist, special instructor, physical therapist; Bruder & Dunst, 2006). In either model, the service coordinator is responsible for monitoring the implementation of each child's IFSP, coordinating IFSP reviews, communicating regularly with families and other team members, and ensuring that services are delivered using recommended practices. During this time, service coordinators act as team leaders and central sources of information about community resources, individualizing how services are coordinated based on family preferences. They assist families in actively participating in their child's services, sharing information with other team members and community partners, identifying needs, solving problems, and helping families access resources to meet those needs (Childress, 2019). Service coordinators also communicate regularly with other team members (e.g., therapists, special instructors) to track the child's progress, ensure services address IFSP outcomes and family priorities, and keep abreast of any changes that may be needed to the IFSP. These contacts help service coordinators monitor family satisfaction with services and take action when families express concerns. All of these activities are thoroughly documented in the child's EI record by the service coordinator, where additional documentation, such as procedural safeguard forms, contact notes, and medical records, are stored. Maintaining the child's EI record is another responsibility of the service coordinator.

Throughout a family's journey with EI, service coordinators inform parents about transition options so they will be prepared when it is time to exit the system, whether they are relocating from one EI program to another or exiting the EI system completely. Service coordinators discuss options based on family preference, make referrals to agencies outside the EI system (if the families so chooses), and assist families through the eligibility process to receive these outside services. Regardless of where families go and what choices they make for their children, service coordinators are always allies who provide guidance and support to make the transition easier. Service coordinators use coaching practices to build family confidence as they move through transition so they can effectively advocate on behalf of their child. Finally, service coordinators are responsible for coordinating a child's exit from the EI system and gathering all documentation needed to assist the family in preparing to transition to services beyond EI..

This brief summary is intended to describe the various roles and responsibilities of EI service coordinators but cannot adequately capture the intricacies of this work. For a more in-depth

understanding of the work of service coordinators during each stage of the EI process, see Appendix B.

## Summary



Service coordinators are important EI team members whose professionalism and expertise are essential when helping all team members, including the family, navigate the EI process. Whether in dedicated or blended roles, they use family-centered practices and their knowledge of community resources to lead EI teams and create strong partnerships that positively impact child and family life. Service coordinators provide an anchor for the family and other EI team members that is unique among other service delivery systems. Without a service coordinator, families would be navigating a complicated system on their own at a time when many feel the most vulnerable. With a knowledgeable and skilled service coordinator, families and other team members have a guide to whom they can turn for information, assistance, and support. The presence of an engaged service coordinator who understands the role and skillfully conducts the many responsibilities of the position ensures a well-coordinated approach to EI service delivery. It is widely acknowledged in the EI field that families have the right to high-quality, individualized EI services; our field must commit to including service coordination in this acknowledgement by ensuring that the professionals who provide this service receive the attention, understanding, respect, and resources they need and deserve.

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## Appendix A

### Knowledge and Skills for Service Coordinators

*Developed by the Workgroup on Recommended Knowledge and Skills for Service Coordinators (RKSSC), National SC Leadership Institute Group (a subgroup of the National SC Training Workgroup) with guidance and support from the Division for Early Childhood (DEC) and the Early Childhood Personnel Center (ECPC).*

**\*Workgroup on Recommended Knowledge and Skills for Service Coordinators (RKSSC):**

*\*This Workgroup was formed to develop Recommended Knowledge and Skills for Service Coordinators. Upon completion of the task, Knowledge and Skills for Service Coordinators (KSSC) was adopted.*

*Leaders:* Melissa Hardison (KY), Cori Hill (VA) and Sarah Nichols (IL)

*Members:* Rachel Charlot (IA), Freda Collins (DE), Moniqua Johl (CO), Maria Kastanis (IL), Cathy Riley (NM) and Melissa Schnurr (IA)

**Purpose:**

To provide awareness of the foundational knowledge and skills that are necessary for quality service coordination in early intervention.

**Suggested Use:**

Implementation and use of the KSSC is voluntary and the KSSC is not intended to be an exhaustive list. States, programs and territories may already have components of the KSSC included in core competencies or pre-service training and may choose to:

- use the KSSC as appropriate to build, support or augment system-specific requirements for determining desired knowledge, skills and abilities during hiring, training, and preparing service coordinators, and/or
- develop examples regarding what each recommendation looks like in practice to illustrate, explain or assess knowledge and skills.

**Please use the following citation when referring to this work:**

Workgroup on Recommended Knowledge and Skills for Service Coordinators (RKSSC), National Service Coordination Leadership Institute Group. (2020). Knowledge and Skills for Service Coordinators. Retrieved from <https://tinyurl.com/KSSC-8-12-20Final>



## Knowledge and Skills for Service Coordinators (KSSC)

As the cornerstone of early intervention (EI) supports and services, Service Coordinators carry out all activities and responsibilities as identified under [Part C of IDEA \(303-34.\)](#) These activities include serving as the single point of contact to assist families in obtaining access to and coordinating needed early intervention services and other services identified in the Individualized Family Service Plan (IFSP). Service Coordinators should adhere to Part C of IDEA and align their practices with the [DEC Recommended Practices \(DEC RPs\)](#), the [DEC Priority Issues Agenda](#), and the [Agreed Upon Mission and Key Principles For Providing Early Intervention Services in Natural Environments](#).

In April 2020, the National SC Leadership Institute Group, in partnership with DEC and the IDEA Infant & Toddler Coordinators Association (ITCA), disseminated a nationwide survey to determine if the DRAFT Recommended KSSC:

- 1) describe the knowledge and skills service coordinators should possess, and
- 2) provide a clear statement of what a service coordinator should know and be able to do upon completion of service coordination preparation/training.

Of the 1002 respondents from 42 states, 68% represented service coordinators and 18% were administrators/supervisors. Forty-four percent (44%) had more than 10 years of experience in early intervention. Overall, respondents were in strong agreement with the KSSC and 89% of respondents found them to be comprehensive and complete. To learn more about the survey findings and how the information was used to finalize the KSSC visit DRAFT [RKSSC Nationwide Survey Highlights & Response to Suggestions](#). An [infographic](#), [visual aid](#), and [crosswalk](#) are also available for additional historical information regarding the development process of the knowledge and skills. Upon completion of the survey, the *Recommended* Knowledge and Skills for Service Coordinators were finalized and renamed as Knowledge and Skills for Service Coordinators.

### **KSSC:**

1. **Infant and Toddler Development:** *Service Coordinators demonstrate knowledge of infant and toddler development including factors that contribute to development such as family context, relationships, culture, socio-economic considerations, environment, and experiences to inform intervention decisions, child development and learning within natural environments.*

Service Coordinators demonstrate the ability to:

- 1.1. Explain developmental delays and disabilities and their impact on children's development and learning to support intervention decisions.
- 1.2. Apply knowledge of typical development, individual differences, and cultural and linguistic diversity to support each child's development and learning within natural environments.



1.3. Support families in their understanding of child development, how each developmental domain contributes to the whole child, and how ongoing progress is monitored.

2. **Family-Centered Practices:** *Service Coordinators demonstrate ability to respect and support the distinctive qualities of each family, recognizing the family as the teacher, support, decision-maker and advocate for their child.*

Service Coordinators demonstrate the ability to:

- 2.1 Recognize implicit biases and respect the unique qualities of each family (e.g. culture, dynamics, roles, values and practices, etc.) to identify their priorities and needs.
- 2.2 Comprehensively explain family rights and procedural safeguards to families in understandable terms, including when and how they may be applied, to support them in advocating for their child and family.
- 2.3 Promote engagement and family capacity-building to address their priorities and concerns, by supporting them to identify opportunities to achieve goals for their family and child's development and learning.

3. **Leadership/Teaming:** *Service Coordinators demonstrate ability to be an effective leader by building professional, supportive partnerships with families; collaborating and teaming with IFSP team members to include family members; and engaging/collaborating with a variety of community partners.*

Service Coordinators demonstrate the ability to:

- 3.1. Use effective teaming and collaboration practices in order to support families and other professionals in carrying out the IFSP.
- 3.2. Partner with families to identify, share, and access available community resources/services, parent groups, and state/local advocacy organizations.

4. **Coordination of Services:** *Service Coordinators demonstrate ability to coordinate and monitor the timely delivery of identified evidence-based early intervention services.*

Service coordinators demonstrate the ability to:

- 4.1. Comprehensively orient all families to the early intervention system and discuss formal and informal supports, and opportunities available to them.
- 4.2. Explain to families how early intervention is funded and answer any questions related to systems of payments in understandable terms.
- 4.3. Coordinate evaluations and assessments, identify and facilitate the multidisciplinary eligibility determination process, and ensure family participation through this process.
- 4.4. Facilitate IFSP development (initial, reviews, annuals) including functional outcomes addressed within family routines and natural environments.
- 4.5. Monitor progress and timely delivery of services in accordance with the IFSP.
- 4.6. Partner with families to coordinate educational, social, and medical services that the child needs or is being provided outside of EI.



5. **Transition:** *Service Coordinators implement smooth and effective transition plans with the family that identify the events, activities, and processes associated with key changes between environments or programs during the early childhood years.*

Service Coordinators demonstrate the ability to:

- 5.1. Partner with families to plan and implement appropriate and individualized events, activities, and processes that support transitions across settings, agencies, and throughout the early intervention process.
- 5.2. Manage required timelines, processes, and documentation to support successful transitions.
- 5.3. Support a variety of planned and timely strategies for successful adjustment and positive outcomes for both the child and family as they exit early intervention.

6. **Professionalism:** *Service Coordinators demonstrate professionalism by using personal and professional boundaries, flexibility, resiliency, time management, dependability, and by engaging in ongoing professional development.*

Service Coordinators demonstrate ability to:

- 6.1. Apply organizational skills to meet and manage required timelines and documentation.
- 6.2. Reflect and evaluate current practices to determine strengths and areas of growth to access professional development to improve practices.
- 6.3. Set personal and professional boundaries and use leadership skills, applying ethical practices, policies and procedures in relationships and interactions.



## Appendix B

### The Roles and Responsibilities of the Service Coordinator During the EI Process

From first contacts through a child's exit from the EI system, a service coordinator is a consistent presence for each family, providing a level of guidance and support that is unique to the EI system. Service coordination itself is a service that is highly individualized for each family, making the work of the professionals who provide this service complex, especially when supporting many families at once. Service coordinators must take their knowledge of how to navigate the EI process and adapt it to each family's priorities, needs, interests, and preferences so that, in the end, families learn how to navigate the process themselves. What follows is a detailed explanation of the roles and responsibilities of the service coordinator at key steps in this process.

#### Making the first contact with the family.

Depending on how an individual EI program operates, the service coordinator may be the person who receives referrals and makes the first contact with a family. For example, contacts may include answering the phone when parents call to refer their child or receiving a referral from a pediatrician and then calling the parent to make the initial contact. How these processes work vary among states and within local programs. When service coordinators make this first contact, they set the stage by explaining how EI works. They answer questions and use active listening strategies to gather information from the parent about the reason for the child's referral as well as any concerns and priorities the family has related to the child's development. If this first contact is typically made by someone other than the service coordinator, the information gathered is shared with the service coordinator so contact can be made and an initial visit scheduled.

#### Conducting the initial visit with the family.

Following the first contact, an initial visit, sometimes referred to as an intake meeting, is scheduled with the family to welcome them to the program. Who conducts this visit (i.e., service coordinator or other team member) and what happens during the meeting may vary depending on state and local policies and procedures. Some programs employ initial or temporary service coordinators who support families for the first 45 days after referral or until the initial IFSP is written, after which an ongoing or permanent service coordinator steps in to continue family support. In other programs, the ongoing or permanent service coordinator begins working with the family at either referral or the initial visit.

When service coordinators first meet with a family, they begin to get to know the child and family and start building a trusting, collaborative relationship. During this visit, the service coordinator shares additional information about EI, describing what to expect from the EI process and explaining what high-quality services that employ evidence-based practices look like. The family's role as active participants and decision-makers in the process is also emphasized.



Additionally, information is gathered about the child's development and daily routines, medical history, and the family's priorities and concerns. Families are informed about rights and procedural safeguards, important timelines, and the financial processes associated with enrollment in the program. Service coordinators work with families to understand and complete documentation, such as prior written notices, consent forms, family assessments, intake forms, releases of information, and other forms and processes required by state and local programs.

The service coordinator begins planning with the family for evaluation and assessment by explaining eligibility criteria and how a child's eligibility is determined. A family assessment may be conducted at this visit or in a subsequent visit, depending on state or local requirements. If the child is found eligible for services, the process used to develop the IFSP is explained and the transition process at the end of EI service delivery is introduced. This initial visit is typically a busy one that requires planning and organization on the part of the service coordinator as well as balancing the giving and gathering of information with the family (Woods & Lindeman, 2008). The visit typically concludes with a review of next steps for the family, including scheduling the evaluation and assessment at a time and place that are convenient for the family while still abiding by the 45-day timeline.

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### Coordinating evaluation and assessment.

At this step in the EI process, evaluation and assessment activities center around determining the child's eligibility for services. This is accomplished by gathering information about the family's priorities and concerns for the child's development and participation in daily activities and assessing the child's development in preparation for writing the IFSP if the child is found eligible. How the service coordinator participates in these activities varies according to state- and program-level procedures.

In programs using a dedicated model of service coordination, service coordinators primarily participate by gathering family assessment information about caregivers' priorities, concerns, and resources related to the child's development, family interests, and activities. This information is essential to the development of a meaningful IFSP, especially in developing outcomes, and may be gathered before or during the evaluation and assessment. Other EI systems use a blended model where a service coordinator is qualified to also conduct child assessments (Dunst & Bruder, 2006). Service coordinators who work in a blended model may also be a therapist or special instructor. In this case, the service coordinator may be qualified to formally assess the child's development. Regardless of the model of service coordination (dedicated or blended) or how the evaluation and assessments are conducted, service coordinators play a critical role in the process. They are responsible for ensuring team member participation while gathering, sharing, and integrating assessment information into the IFSP. Additionally, they closely monitor timelines to ensure a timely start to EI services for families.



Another essential role of the service coordinator during the evaluation and assessment process involves supporting active family participation and decision-making. The service coordinator helps the family share information, monitors family comfort with the process, ensures the family is aware of and understands their rights and procedural safeguards during the process, and ensures that families' preferences are respected. The service coordinator helps family members participate in planning for the evaluation and assessment activities by offering scheduling options, encouraging caregivers to invite anyone important to the family to participate in the assessment, and explaining what to expect and how to prepare. During the evaluation, the service coordinator maintains regular contact with the family and ensures that their questions are answered and that information is provided in their native language, arranging for an interpreter if needed. After the evaluation is completed, the service coordinator summarizes the child's strengths and needs identified during the evaluation to help the family understand their child's eligibility status. Service coordinators also facilitate or participate in the child outcomes summary process, which can occur following the evaluation and assessment or at the IFSP meeting. If the child is found eligible for EI services, the service coordinator offers the family the option to develop an IFSP. If the family declines the IFSP or the child is ineligible, then options are offered, such as referral to other programs. Lastly, the service coordinator makes sure the family knows they can request another referral in the future should they change their mind or other concerns arise.

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### **Facilitating IFSP development.**

While service coordinators have many responsibilities related to the IFSP, conducting the initial IFSP meeting may be one of the most important. A service coordinator's leadership and use of recommended family-centered practices during this part of the process impacts service delivery as well as how families perceive their roles in EI (Childress, Raver, Michalek, & Wilson, 2013; Hallam et al., 2005). Service coordinators who apply recommended family-centered practices as they facilitate the development of the IFSP will (a) use family priorities to guide the team; (b) integrate child interests and family routines, activities, and materials into outcomes; and (c) empower families to be active and informed decision-makers as EI and non-EI services are identified and transition planning occurs. The service coordinator also prepares documentation to write the plan and makes sure the IFSP meeting occurs within the 45-day timeline.

During the IFSP meeting, the service coordinator explains the process to the family and emphasizes that the IFSP is a fluid, working document that can be changed whenever priorities change, the child makes progress, etc. The IFSP process is facilitated to ensure the family members know they are valued and equal team members and that their input will be used to guide what is written in the plan. The service coordinator facilitates discussions that link family priorities and concerns, information from the evaluation and assessment process, and expertise from all team members. This discussion results in the development of family and child outcomes that are individualized, functional, measurable, and situated in the context of child interests and family routines.



After outcomes are written, the service coordinator begins the discussion about possible EI services. The discussion begins by exploring existing strengths and resources and includes a description of what EI services typically look like when provided in natural environments. The service coordinator may describe a typical intervention visit and provide examples of possible intervention approaches. The service coordinator emphasizes the mission of EI, which is to support family members as they interact with their children to encourage development during daily activities (Workgroup on Principles and Practices in Natural Environments, 2008). Service options are shared with the family, and their input is used to determine service type, frequency, length, and location. Transition planning also occurs during the IFSP meeting and is documented on the plan. The family is given time to review the IFSP and then sign it to verify their participation in the IFSP process. Once the plan is signed, the service coordinator provides a copy to the family and begins the process of coordinating the EI service(s) the child and family will receive.

### **Providing ongoing service coordination and monitoring IFSP implementation.**

Once the IFSP is signed, the service coordinator focuses on the initiation of EI services within the required timelines. The service coordinator then coordinates and monitors service delivery to ensure that it aligns with the child's IFSP. This involves making regular, ongoing contact with the family and other EI team members who support the family. These contacts can occur by telephone; electronically by text, email, or telehealth visits (as permitted by local or state guidance); or during in-person visits with families. Depending on program requirements, the visits may include the service providers. While there are no federal requirements for the frequency or type of contacts, there may be state- or program-level requirements for service coordination contacts. Regular, frequent contact (at least monthly) with all team members is recommended so the service coordinator can stay abreast of the child's progress and any changes in family priorities, resources, concerns, life circumstances, and needs (Bruder & Dunst, 2008). When changes occur, the service coordinator can facilitate an IFSP review meeting to revisit the outcomes and services and consider, with team members, whether changes are warranted. Regardless, IFSP reviews are required at least every six months and annually and are also coordinated by the service coordinator.

Maintaining the EI record to include thorough, accurate documentation of the family's journey through the process is an important service coordinator responsibility. Service coordinators document all contacts and IFSP reviews in the child's EI record and, as appropriate, on the IFSP. The service coordinator ensures that family rights and procedural safeguard documentation is completed, information releases are maintained, timelines are recorded, and contact notes reflect the work they do on behalf of the family during ongoing service delivery.

In addition to coordinating and monitoring the delivery of other EI services, service coordinators also continue to work closely with the family. It is during this time, while services are being



implemented, that service coordinators regularly check in with families for progress updates and to celebrate new milestones, ask about their satisfaction with EI, respond to requests for information or assistance, and link families to needed community resources. The goal of service coordination during this time is to help the family learn to navigate the EI system and meet their own needs, including accessing community resources, with less assistance over time. To meet this goal, service coordinators help families learn to advocate for themselves and access available resources when needed, including transition options for services after the child leaves the EI system.

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### Coordinating transition and exit from the EI system.

Service coordinators are key team members during the transition and exit processes. In EI, *transition* refers to the process of supporting children and families as they move between programs or leave the EI system, such as (a) when a family relocates and the child is referred to another EI program; (b) when a child leaves the EI program to begin receiving early childhood special education or other preschool-age services; (c) after the child's third birthday, when the child moves to other non-EI community services; or (d) when a child is discharged after making sufficient progress and no longer qualifying for services. Because all children in EI will eventually transition, discussions about this process between the service coordinator and the family begins as early as the initial visit. Successful transitions require ongoing conversations with families as service coordinators help families gather information, explore their options, and prepare to make informed decisions. Service coordinators also assist families as they prepare for transition by ensuring required transition planning meetings occur, reviewing family rights, answering questions as they arise, and perhaps even arranging for and attending visits with potential transition options with families. Family support during the transition process requires that service coordinators exercise patience and objectivity as they help families think about what they want for their children.

When a transition is approaching or a family chooses to exit the EI program for any reason, the service coordinator conducts an exit process to close the child's record with the EI program. In addition to requirements for transition, the exit process may include an exit (or discharge) meeting with the family as well as a collection of summary information from service providers. At this time, families are reminded of their rights and safeguards. To complete the exit process, service coordinators are required to complete final documentation and may conduct a final IFSP review to document the child's and family's progress and plan for exit. When facilitating a smooth exit, service coordinators help families feel confident about leaving the EI system and well-prepared for the next steps in their journey with their child.

## Contributors



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